

FINANCIAL DISCLOSURE MANAGEMENT

Supervisor's Assistant Guide



Table of Contents

Registering a New User in FDM

I. LOGGING IN TO FDM.....	3
II. MY INFO - MY FILERS.....	4
ADDING A NEW FILER FOR THE SUPERVISOR YOU ASSIST	4
Selecting the Filer's Role	8
DELETING A FILER FROM THE SUPERVISOR YOU ASSIST.....	10

Managing User Registration

I. MANAGING REGISTRATION	12
Review Filers Reports List Pending Self Registration Requests link	12
Locating the Pending Filer List	13
DENYING A REGISTRATION.....	15
CHANGING A PENDING REGISTRANT'S SUPERVISOR AND SENIOR LEGAL COUNSEL	16
LOCATING A PENDING REGISTRANT FOR A DIFFERENT SUPERVISOR	21

Reassigning Filer Groups

REASSIGN GROUPS.....	22
ACTING AND DIRECT RELATIONSHIPS.....	22
Verifying the Filer's Reassignment	27

Checking Statuses

VIEWING FILER STATUS.....	28
PRINTING THE REPORTS LIST PAGE.....	29
VIEWING A REPORT SUMMARY	30

Managing Supervisor's in FDM

ADDING A NEW SUPERVISOR TO FDM	31
Search for a Supervisor within FDM	31
Adding a New Supervisor to FDM	32
Selecting a Senior Legal Counsel for a Supervisor	35
Complete Adding a Supervisor in FDM	

Managing User Profiles

VIEW USER PROFILES	37
Changing a Filer's Agency and Filer Category	40



Scenario


You are a Supervisor Assistant and need to add a new OGE 450 filer to FDM.

Registrant	FDM Role	Supervisor
R. Price	OGE 450 Filer	B. Nicholson

I. Logging In To FDM

🔗 **NOTE:** FDM is located at the following site: <https://www.FDM.army.mil>. This is the site you would normally log into. However, for the purposes of training, a different site is being used.

1. Type **<https://158.9.48.244>** to access the FDM Training site, then click **FDM Login**. The FDM Login page is displayed.

FDM_TRAIN Test System


Financial Disclosure Management - Training

Welcome to FDM, your assistant for preparing your SF 278 and OGE 450 Financial Disclosure Reports

Login to FDM

Login using your CAC

[Forgot your CAC PIN?](#)

Or

Login using AKO

User Name:

Password:

Agency: Army

[Forgot your AKO password?](#)

Not Registered?

Register to be an FDM user or to add roles to your current FDM account.

Test Your CAC

FDM uses your CAC to complete electronic filing. Test your CAC to ensure it works with FDM even if you have used it with other programs.

Warning - This is a U.S. Government computer system subject to federal law.

Financial Disclosure Management is hosted on a U.S. Government computer system and is intended for authorized U.S. Government use only. Unauthorized attempts to upload or otherwise alter information are strictly prohibited and may be punishable under the Computer Fraud and Abuse Act of 1986.

2. Type your training User Name and Password. Click **Login**. The FDM Welcome Page is displayed.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports | My Info | Review Filers | Admin | Resources | Log Out

Reports List

Welcome Training X. 450_1

- ▶ Annual OGE 450 Reports are due 15 February.
- ◆ To start a new OGE 450 report click "Add New Report".
- ◆ To work on an existing report select a report from the table below.

My OGE 450 Reports

Year	Reporting Status	Review Status	Last Updated	
2006	New Entrant	Draft	11/30/2006	Add New Report Edit Delete

Common Questions

- Glossary

II. My Info - My Filers

Adding a New Filer for the Supervisor You Assist

1. After logging into FDM, select the **My Info** tab and then select the **My Filers** sub-heading. The My Filer's - Supervisor's View page is displayed.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports | My Info | Review Filers | Admin | Resources | Log Out

Contact Information | My Assistants | My Filers | My Profile

My Filers - Supervisor View

Instructions: Use the "Change Assist" button to select or change which Supervisor, Senior Legal Counsel or ADAEO you assist and view their related filers.

Last Name: * Starts With

First Name: Starts With

Middle Name: Starts With

e-mail: Starts With

Agency: Army

*Required Items Per Page 20

[Change Who I am Assisting...](#)

Warning: 450_1, Training X. does not have any filers.

2. Click **Change Who I Am Assisting**. The Change the Supervisor You Assist page is displayed.

- Any of the following FDM roles can register a new Filer: Senior Legal Counsel (SLC), Senior Legal Counsel Assistant, Ethics Counselor (EC), Supervisor and Supervisor's Assistant. These roles can also change a Filer's review chain information.

To add a new filer, you must first select the appropriate Supervisor you are assisting and then associate the filer to them.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports | My Info | **Review Filers** | Admin | Resources

Contact Information | My Assistants | **My Filers** | My Profile

Change the Supervisor You Assist

Supervisor's You Assist	
Nicholson, B X.	Select
Super_450_1, Training X.	Select

Cancel

- Click **Select** beside B. Nicholson's name. The My Filers - Assisting Supervisor, Nicholson, B. page displays a listing of the filers associated to B. Nicholson.

- The Filers names display in alphabetical order. You can select to view more items per page or click the forward arrow if the name you are searching for is not listed initially.
- Your view on the My Filers page is based upon the role(s) you have in FDM.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports | My Info | **Review Filers** | Admin | Resources

Contact Information | My Assistants | **My Filers** | My Profile

My Filers - Assisting Supervisor Nicholson, B X.

Instructions: Use the "Change Assist" button to select or change which Supervisor, Senior Legal Counsel or ADAEO you assist and view their related filers.

Last Name: * Starts With [v] []
 First Name: Starts With [v] []
 Middle Name: Starts With [v] []
 e-mail: Starts With [v] []
 Agency: Army [v]
 *Required Items Per Page 20 [v] Search

Add Filer
 Change Who I am Assisting...

1 to 5 of 5		Items per page: 20 [v]		1		
Search Results						
Last Name	First Name	Middle Name	Grade	E-Mail Address	Phone	Roles
450_25	Training	X	GS13	training_450_25@us.army.mil	000-000-0000	OGE 450 Filer
450_26	Training	X	GS13	training_450_26@us.army.mil	000-000-0000	OGE 450 Filer
450_27	Training	X	GS13	training_450_27@us.army.mil	000-000-0000	OGE 450 Filer

- A new filer, **R. Price**, is not listed. Click **Add Filer**. The Select New Filer screen is displayed.

- ☞ Select either “Starts With” or Contains when searching. For faster results, type the full last name and partial first name of the filer.
- ☞ The New Filer search, searches within the Global Directory Service.
- ☞ If searching by e-mail, enter the filer’s DOD Common Access Card embedded e-mail address only.
- ☞ Once a Filer is added, they may begin creating draft financial disclosure reports.

FDM_TRAIN Test System

Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Contact Information My Assistants My Filers My Profile Log Out

Select New Filer

Instructions: Use the searching function below to identify the individual you want to add to FDM as a new Filer. When you find the appropriate individual, press the 'Select' button in the corresponding row to continue with the Add process.

Last Name: * Starts With Price_1

First Name: Starts With R

Middle Name: Starts With

e-mail: Starts With

Agency: Army

*Required Items Per Page 20 Search

Cancel

5. Type **Price_X** in the Last Name field and **R** in the First Name field. Click **Search**. Any matching search results displays at the bottom of the screen.

Note: When typing the new Filer’s last name, X represents your assigned training ID number. For example, if you logged on as 450_11, then you would type Price_11 in the Last Name field.

FDM_TRAIN Test System

Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Contact Information My Assistants My Filers My Profile Log Out

Select New Filer

Instructions: Use the searching function below to identify the individual you want to add to FDM as a new Filer. When you find the appropriate individual, press the 'Select' button in the corresponding row to continue with the Add process.

Last Name: * Starts With Price_1

First Name: Starts With R

Middle Name: Starts With

e-mail: Starts With

Agency: Army

*Required Items Per Page 20 Search

Cancel

1 to 11 of 11 Items per page: 20 1

Last Name	First Name	Middle Name	Grade	E-Mail Address	Phone	Organization	
Price_1	R	X	GS13	r_price_1@us.army.mil	000-000-0000	Civilian	Select
Price_10	R	X	GS13	r_price_10@us.army.mil	000-000-0000	Civilian	Select
Price_11	R	X	GS13	r_price_11@us.army.mil	000-000-0000	Civilian	Select
Price_12	R	X	GS13	r_price_12@us.army.mil	000-000-0000	Civilian	Select

6. Click **Select** to the right of **R. Price’s** name. The Add New Filer screen is displayed.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources
 Contact Information My Assistants My Filers My Profile

Edit Filer - Price_1, R X.

Instructions: Specify the following relationships for the filer.

Attribute	Value
Last Name	Price_1
First Name	R
Middle Name	X
e-Mail	r_price_1@us.army.mil
Organization	
Phone	000-000-0000
Agency	USARMY

Supervisor: Nicholson, B X. [Change](#)
 Senior Legal Counsel: Pickney, E X. [Change](#)
 ADAEO (only required for SF 278): Adaeo_1, Training X. [Change](#)

Roles

☐ OGE 450 Filer
☐ SF 278 Filer (General Officers and Senior Executive Service)

[Save](#) [Cancel](#)

A default review chain is established for Filers and Supervisors in FDM. If you know that a member of the Filer's review chain is different from the default, please update them appropriately.

R. Price's Supervisor is set to B. Nicholson. However, we made a mistake and should change R. Price's Supervisor to Super_450_1, Training.

Starts With is the default selection when searching. Selecting Contains searches all names that include the entered characters. For faster results, type the full last name and partial first name of the filer.

The Select Supervisor search, searches within FDM only.

At any time, you can change a Filer's Supervisor, Senior Legal Counsel and ADAEO by clicking **Change** beside the appropriate role.

- Click **Change** beside the Supervisor's field. The Select Supervisor page is displayed.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources
 Contact Information My Assistants My Filers My Profile

Select Supervisor

Instructions: Use the searching function below to identify the individual you want to choose as Supervisor for the filer. When you find the appropriate individual, press the 'Select' button in the corresponding row to continue.

Last Name:* Starts With
 First Name: Starts With
 Middle Name: Starts With
 e-mail: Starts With
 Agency:
 *Required Items Per Page [Search](#) [Cancel](#)

- Type **Super_450_1** in the Last Name field and **Training** in the First name field and click **Search**. A listing of matching FDM user names is displayed.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Contact Information My Assistants My Filers My Profile

Select Supervisor

Instructions: Use the searching function below to identify the individual you want to choose as Supervisor for the filer. When you find the appropriate individual, press the 'Select' button in the corresponding row to continue.

Last Name: * Starts With Super_450_1
 First Name: Starts With Training
 Middle Name: Starts With
 e-mail: Starts With
 Agency: Army

*Required Items Per Page 20 Search

1 to 1 of 1 Items per page: 20 1

Last Name	First Name	Middle Name	Grade	E-Mail Address	Phone	Organization	
Super_450_1	Training	X	GS13	training_super_450_1@us.army.mil	000-000-0000	Civilian	Select

9. Click **Select** beside **Super_450, Training**. The Add New Filer page is displayed listing the new supervisor.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Contact Information My Assistants My Filers My Profile

Edit Filer - Price_1, R X.

Instructions: Specify the following relationships for the filer.

You have selected to add a filer that will have a Supervisor different than yourself.

Attribute	Value
Last Name	Price_1
First Name	R
Middle Name	X
e-Mail	r_price_1@us.army.mil
Organization	
Phone	000-000-0000
Agency	USARMY

Supervisor: Super_450_1, Training X. Change

Senior Legal Counsel: Pickney, E X. Change

ADAEO (only required for SF 278): Adaeo_1, Training X. Change

Roles
<input checked="" type="checkbox"/> OGE 450 Filer
<input type="checkbox"/> SF 278 Filer (General Officers and Senior Executive Service)

Save Cancel

Selecting the Filer's Role

In FDM, a Filer can be an OGE 450 Filer or an SF 278 Filer. The OGE 450 is a confidential financial disclosure report and the SF 278 is a public financial disclosure report.

10. Select **OGE 450 Filer** in the Roles section and click **Save**. The My Filers – Supervisor View page is displayed listing the filers for B. Nicholson.

The FDM filer, R. Price, receives an e-mail message notifying him that he may use FDM and create a financial disclosure report.

- Please contact your POC to determine which Filer's are OGE 450 and SF 278 report filers.
- A filer can update their review chain at any time by selecting **My Info | My Review Chain**.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports | My Info | Review Filers | Admin | Resources

Contact Information | **My Assistants** | My Filers | My Profile

My Filers - Assisting Supervisor Nicholson, B X.

Instructions: Use the "Change Assist" button to select or change which Supervisor, Senior Legal Counsel or ADAEO you assist and view their related filers.

Last Name: * Starts With
 First Name: Starts With
 Middle Name: Starts With
 e-mail: Starts With
 Agency: Army
 *Required

Add Filer
Change Who I am Assisting...

Items Per Page 20 Search

1 to 5 of 5 Items per page: 20 1

Last Name	First Name	Middle Name	Grade	E-Mail Address	Phone	Roles	Edit	Delete
450_25	Training	X	GS13	training_450_25@us.army.mil	000-000-0000	OGE 450 Filer	Edit	Delete
450_26	Training	X	GS13	training_450_26@us.army.mil	000-000-0000	OGE 450 Filer	Edit	Delete
450_27	Training	X	GS13	training_450_27@us.army.mil	000-000-0000	OGE 450 Filer	Edit	Delete
Adams_22	A	X	GS13	a_adams_22@us.army.mil	000-000-0000	OGE 450 Filer, SF 278 Filer	Edit	Delete
Shaw_9	B	X	GS13	r_shaw_9@us.army.mil	000-000-0000	OGE 450 Filer	Edit	Delete

- To verify that R. Price was added to Training Super_450_1, click **Change Who I am Assisting** and then click **Select** beside Super_450_1, Training.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports | My Info | Review Filers | Admin | Resources

Contact Information | My Assistants | **My Filers** | My Profile

My Filers - Assisting Supervisor Super_450_1, Training X.

Instructions: Use the "Change Assist" button to select or change which Supervisor, Senior Legal Counsel or ADAEO you assist and view their related filers.

Last Name: * Starts With
 First Name: Starts With
 Middle Name: Starts With
 e-mail: Starts With
 Agency: Army
 *Required

Add Filer
Change Who I am Assisting...

Items Per Page 20 Search

21 to 27 of 27 Items per page: 20 1 2

Last Name	First Name	Middle Name	Grade	E-Mail Address	Phone	Roles	Edit	Delete
450_30	Training	X	GS13	training_450_30@us.army.mil	000-000-0000	OGE 450 Filer	Edit	Delete
450_4	Training	X	GS13	training_450_4@us.army.mil	000-000-0000	OGE 450 Filer	Edit	Delete
450_5	Training	X	GS13	training_450_5@us.army.mil	000-000-0000	OGE 450 Filer	Edit	Delete
450_7	Training	X	GS13	training_450_7@us.army.mil	000-000-0000	OGE 450 Filer	Edit	Delete
450_8	Training	X	GS13	training_450_8@us.army.mil	000-000-0000	OGE 450 Filer	Edit	Delete
450_9	Training	X	GS13	training_450_9@us.army.mil	000-000-0000	OGE 450 Filer	Edit	Delete
Price_1	B	X	GS13	r_price_1@us.army.mil	000-000-0000	OGE 450 Filer	Edit	Delete

- R. Price is listed at the bottom of page 2 in the listing of Filers.

Deleting a Filer from the Supervisor You Assist

A Supervisor's Assistant, can delete an OGE 450 filer from FDM, if the Filer has not submitted a financial disclosure report in FDM.

To delete a filer from FDM, follow steps, 1 through 4 in this scenario. Click **Delete** beside the user's name. A message displays confirming that you wish to remove the filer role for the selected user along with any draft reports they may have created.

Important Note

A supervisor's assistant should be extremely careful when using this function. If a filer is deleted from the system, then any draft reports created by that filer will also be deleted.



Scenario

Three individuals have self-registered in FDM and their registration status is pending. As a Supervisor Assistant, you need to act upon these requests as follows:

- ♦ The first Filer made the correct selections and her registration should be confirmed.
- ♦ The second Filer indicated he was an OGE 450 filer but actually should not be filing a report.
- ♦ The third Filer choose the incorrect Supervisor and Senior Legal Counsel.

The table below indicates the correct registration selections for your assigned filers.

Registrant	FDM Role	Supervisor	SLC	Confirm/ Deny/Edit
R. Shaw	Filer	B. Nicholson	E. Pickney	Confirm
M. Mallow	Filer	B. Nicholson	E. Pickney	Deny
P. Jays	Filer	450-XX Training	E. Pickney	Edit and Confirm

I. Managing Registration

- ❖ If you have multiple roles in FDM, select your role, **Supervisor Assistant**, from the My Role drop-down list and click **Go**.
- ❖ FDM Reviewers, Supervisors, ECs, SLCs and ADAEO roles will see their **Review Filers | Reports List** once they log in. All other roles will be taken to the **Review Filers / Reports List** page.

An FDM Filer or Supervisor who self registers is a **pending registrant** until their registration is confirmed. Pending Filers cannot eSign or submit their reports until their registration is confirmed. Likewise, pending Supervisors cannot review disclosure reports until their registration is approved.

Pending Self-Registration requests can be accessed in two ways: from the Pending Self Registration link on the **Review Filers | Reports List** page or from **Admin | Pending** tab.

Review Filers|Reports List Pending Self Registration Requests link

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Reports List

Welcome Training X. 450_1

Annual OGE 450 Reports are due 15 February.

You have pending registrations. Go to [Pending Self Registration Requests](#) to confirm or deny registrations.

My OGE 450 Filer's Reports

Form Type: My Role: Year: Reporting Status: Review Status:

OGE 450 Supervisor Assistant 2006 ALL Under Review Go Reset

1 to 3 of 3 Items per page: 20

Filer	Registration Status	Year	Reporting Status	Review Status	Review Date	Signature Date
450_25, Training X.	Active	2006	New Entrant	Under Review Amended 12/04/2006		
450_25, Training X.	Active	2006	New Entrant	Under Review		
450_27, Training X.	Active	2006	New Entrant	Under Review		

Common Questions

- What does it mean to "End" a review?
- What does Amended mean?
- What does Amendment in Progress mean?
- How do I see the reports assigned to me if I have more than one role in FDM?
- What does Complete Report mean?
- Glossary

For the purposes of training, the **Admin|Pending** tab will be used.

NOTE: If you are a Supervisor Assistant and a Filer, after logging into FDM, the application defaults to the **My Reports | Reports List** page.

If your role in FDM is only a Supervisor Assistant, after log in, the application defaults to the **Review Filers | Reports List** page, which contains a link to the Pending Self-Registration Requests page.

Locating the Pending Filer List

1. Select the **Admin|Pending** tab to view a list of pending self-registration requests. A listing of your pending filers is displayed.

- ❖ Pending filers can create a draft OGE 450 financial disclosure report, change contact information, change assistants and supervisors but cannot eSign and submit reports.

- ❖ Pending Supervisors cannot perform FDM supervisory functions until their registration is confirmed. They can only change their contact information.

- ❖ Automatic e-mail messages are sent to the FDM Filer, Supervisor and Senior Legal Counsel any time changes are made to a pending registrant or confirmed registrant.

FDM_TRAIN Test System

Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Pending Self Registration Requests

Instructions: This page displays Pending Self Registration Requests to be confirmed or denied by the responsible individual. Make a selection in the "My Role" selection menu and press the "Go" button to filter the list to only those Requests that are related to you in the role you selected. Press "Show All" to display every Request for all users within your agency.

My Role: Supervisor Assistant Go or Show All

Filtered By: Supervisor Assistant

Role	Name ▲	Supervisor	Senior Legal Counsel	ADAEQ	Supervisor Text & e-Mail	SLC Text & e-Mail	
OGE 450 Filer	Jays_10, P X	Nicholson, B X	Pickney, E X				Confirm Deny Edit
OGE 450 Filer	Jays_11, P X	Nicholson, B X	Pickney, E X				Confirm Deny Edit
OGE 450 Filer	Jays_12, P X	Nicholson, B X	Pickney, E X				Confirm Deny Edit
OGE 450 Filer	Jays_13, P X	Nicholson, B X	Pickney, E X				Confirm Deny Edit

Confirming a Pending Registrant

1. Click **Confirm** to the right of registrant **R. Shaw** to confirm her registration. A message displays confirming this request.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Pending Self Registration Requests

Instructions: This page displays Pending Self Registration Requests to be confirmed or denied by the responsible individual. Make a selection in the "My Role" selection menu and press the "Go" button to filter the list to only those Requests that are related to you in the role you selected. Press "Show All" to display every Request for all users within your agency.

My Role: Supervisor Assistant Go or Show All

Filtered By: Supervisor Assistant

Role	Name	Supervisor	Senior Legal Counsel	ADAEQ	Supervisor Text & e-Mail	SLC Text & e-Mail	
OGE 450 Filer	Shaw_8, X						
OGE 450 Filer	Shaw_7, X						
OGE 450 Filer	Shaw_6, X						
OGE 450 Filer	Shaw_5, R X	Nicholson, B X	Pickney, E X				Confirm Deny Edit

Microsoft Internet Explorer

? You are about to CONFIRM OGE 450 Filer registration for user Shaw_8, R. X. Are you sure?

OK Cancel

2. Click **OK**. The Pending Self-Registration Requests page is displayed. The FDM filer, R. Shaw receives an e-mail message notifying her that her registration has been confirmed.

Denying a Registration

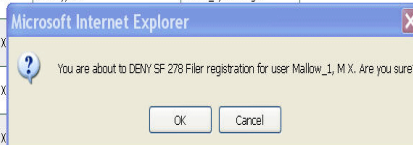
- ❖ Any draft reports are automatically deleted once registration is denied. The filer will need to re-enter any report data in a new report once registration has been confirmed.
- ❖ If denied, a filer may re-register at any time as long as they are in a position that requires them to file a disclosure report.

M. Mallow registered as an OGE 450 Filer and does not need to file a report. You must deny his registration as an OGE 450 filer.

OGE 450 Filer	Jays_8, P X	Nicholson, B X	Pickney, E X				Confirm Deny Edit
OGE 450 Filer	Jays_9, P X	Nicholson, B X	Pickney, E X				Confirm Deny Edit
SF 278 Filer	Mallow_1, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_10, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_11, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_12, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_13, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_14, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_15, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_16, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_17, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_18, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_19, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit

1. Click **Deny** to the right of M. Mallow. A message displays confirming that you wish to deny M. Mallow's registration.

SF 278 Filer	Mallow_1, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_10, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_11, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_12, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_13, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_14, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_15, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_16, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_17, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_18, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_19, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit
SF 278 Filer	Mallow_2, M X	Nicholson, B X	Pickney, E X	Adao_1, Training X			Confirm Deny Edit



2. Click **OK**. The Pending Self-Registration Requests page is displayed.

M. Mallow receives an e-mail message indicating that his FDM registration has been denied. Any draft reports that he may have created are automatically deleted.

Changing a Pending Registrant's Supervisor and Senior Legal Counsel

You must change P. Jay's supervisor from B. Nicholson to Training Super_450_1 and his Senior Legal Counsel from E. Pickney to Training SLC_450_1.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Pending Self Registration Requests

Instructions: This page displays Pending Self Registration Requests to be confirmed or denied by the responsible individual. Make a selection in the "My Role" selection menu and press the "Go" button to filter the list to only those Requests that are related to you in the role you selected. Press "Show All" to display every Request for all users within your agency.

My Role: Supervisor Assistant or

Filtered By: Supervisor Assistant

Role	Name ▲	Supervisor	Senior Legal Counsel	ADAEQ	Supervisor Text & e-Mail	SLC Text & e-Mail	
OGE 450 Filer	Jays_10, P X	Nicholson, B X	Pickney, E X				Confirm Deny Edit
OGE 450 Filer	Jays_11, P X	Nicholson, B X	Pickney, E X				Confirm Deny Edit
OGE 450 Filer	Jays_12, P X	Nicholson, B X	Pickney, E X				Confirm Deny Edit
OGE 450 Filer	Jays_13, P X	Nicholson, B X	Pickney, E X				Confirm Deny Edit

1. Click **Edit** to the right of registrant P. Jays. The Edit Filer page displays.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Edit OGE 450 Filer Jays_1, P X.

Instructions: Specify the following relationships for the filer.

Attribute	Value
Last Name	Jays_1
First Name	P
Middle Name	X
e-Mail	p_jays_1@us.army.mil
Organization	
Phone	000-000-0000
Agency	USARMY

Supervisor: Nicholson, B X.

Senior Legal Counsel: Pickney, E X.

Security and Privacy Notice | Help | Accessibility | Developed by: C-E LCMC

2. Click **Change** beside his current Supervisor's name. The Select Supervisor page displays.

FDM_TRAIN Test System

Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Select Supervisor

Instructions: Use the searching function below to identify the individual you want to choose as Supervisor for the filer. When you find the appropriate individual, press the 'Select' button in the corresponding row to continue.

Last Name:* Starts With Super_450_1

First Name: Starts With Training

Middle Name: Starts With

e-mail: Starts With

Agency: Army

*Required Items Per Page 20 Search

Cancel

Security and Privacy Notice | Help | Accessibility | Developed by: C-E LCMC

- Type **Super_450** in the Last Name field and **Training** in the First name field and click **Search**. A listing of matching FDM user names is displayed.

FDM_TRAIN Test System

Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Select Supervisor

Instructions: Use the searching function below to identify the individual you want to choose as Supervisor for the filer. When you find the appropriate individual, press the 'Select' button in the corresponding row to continue.

Last Name:* Starts With Super_450_1

First Name: Starts With Training

Middle Name: Starts With

e-mail: Starts With

Agency: Army

*Required Items Per Page 20 Search

Cancel

1 to 1 of 1 Items per page: 20 1

Search Results

Last Name	First Name	Middle Name	Grade	E-Mail Address	Phone	Organization	
Super_450_1	Training	X	GS13	training_super_450_1@us.army.mil	000-000-0000	Civilian	Select

- Click **Select** beside **Training Super_450**. The Edit Filer page is displayed with Training Super_450_1 as the Supervisor.

FDM_TRAIN Test System

Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Edit OGE 450 Filer Jays_1, P X.

Instructions: Specify the following relationships for the filer.

Attribute	Value
Last Name	Jays_1
First Name	P
Middle Name	X
e-Mail	p_jays_1@us.army.mil
Organization	
Phone	000-000-0000
Agency	USARMY

Supervisor: Super_450_1, Training X. [Change](#)

Senior Legal Counsel: Pickney, E X. [Change](#)

[Save](#) [Cancel](#)

- Follow the same steps to change the Senior Legal Counsel. Click **Change** beside his current Senior Legal Counsel's name. The Select Supervisor page displays.

FDM_TRAIN Test System

Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Select Senior Legal Counsel

Instructions: Use the searching function below to identify the individual you want to choose as Senior Legal Counsel for the filer. When you find the appropriate individual, press the 'Select' button in the corresponding row to continue.

Last Name:* Starts With SLC_450_1

First Name: Starts With Training

Middle Name: Starts With

e-mail: Starts With

Agency: Army

*Required

Items Per Page 20 Search

[Cancel](#)

- Type **SLC_450** in the Last Name field and **Training** in the First name field and click **Search**. A listing of matching FDM user names is displayed.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Select Senior Legal Counsel

Instructions: Use the searching function below to identify the individual you want to choose as Senior Legal Counsel for the filer. When you find the appropriate individual, press the 'Select' button in the corresponding row to continue.

Last Name: * Starts With SLC_450_1
 First Name: Starts With Training
 Middle Name: Starts With
 e-mail: Starts With
 Agency: Army

*Required Items Per Page 20 Search

Cancel

1 to 1 of 1 Items per page: 20 1

Last Name	First Name	Middle Name	Grade	E-Mail Address	Phone	Organization	
Slc_450_1	Training	X	GS13	training_slc_450_1@us.army.mil	000-000-0000	Civilian	Select

7. Click **Select** beside **Training SLC_450_1**. The Edit Filer page is displayed with **Training SLC_450_1** as the Senior Legal Counsel.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Edit OGE 450 Filer Jays_1, P X.

Instructions: Specify the following relationships for the filer.

Attribute	Value
Last Name	Jays_1
First Name	P
Middle Name	X
e-Mail	p_jays_1@us.army.mil
Organization	
Phone	000-000-0000
Agency	USARMY

Supervisor: Super_450_1, Training X. Change

Senior Legal Counsel: Slc_450_1, Training X. Change

Save Cancel

8. Click **Save**. You return to the Pending Self-Registration Requests page.

P. Jays, B. Nicholson and E. Pickney receive e-mail messages indicating that you changed P. Jays' Supervisor and Senior Legal Counsel.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Pending Self Registration Requests

Instructions: This page displays Pending Self Registration Requests to be confirmed or denied by the responsible individual. Make a selection in the "My Role" selection menu and press the "Go" button to filter the list to only those Requests that are related to you in the role you selected. Press "Show All" to display every Request for all users within your agency.

My Role: Supervisor Assistant or

Filtered By: Supervisor Assistant

Role	Name ▲	Supervisor	Senior Legal Counsel	ADAEO	Supervisor Text & e-Mail	SLC Text & e-Mail	
OGE 450 Filer	Jays_1, P X	Super_450_1, Training X	Slc_450_1, Training X				Confirm Deny Edit
OGE 450 Filer	Jays_10, P X	Nicholson, B X	Pickney, E X				Confirm Deny Edit
OGE 450 Filer	Jays_11, P X	Nicholson, B X	Pickney, E X				Confirm Deny Edit
OGE 450 Filer	Jays_12, P X	Nicholson, B X	Pickney, E X				Confirm Deny Edit

9. Click **Confirm** beside P. Jays' name. A message displays ensuring that you want to confirm this registration.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Pending Self Registration Requests

Instructions: This page displays Pending Self Registration Requests to be confirmed or denied by the responsible individual. Make a selection in the "My Role" selection menu and press the "Go" button to filter the list to only those Requests that are related to you in the role you selected. Press "Show All" to display every Request for all users within your agency.

My Role: Supervisor Assistant or

Filtered By: Supervisor Assistant

Role	Name ▲	Supervisor	Senior Legal Counsel	ADAEO	Supervisor Text & e-Mail	SLC Text & e-Mail	
OGE 450 Filer	Jays_1, P X						Confirm Deny Edit
OGE 450 Filer	Jays_10, P X						Confirm Deny Edit
OGE 450 Filer	Jays_11, P X						Confirm Deny Edit
OGE 450 Filer	Jays_12, P X	Nicholson, B X	Pickney, E X				Confirm Deny Edit
OGE	Jays_13, P						Confirm Deny Edit

Microsoft Internet Explorer

You are about to CONFIRM OGE 450 Filer registration for user Jays_1, P X. Are you sure?

10. Click **OK**.

P. Jays cannot e-Sign or submit his financial disclosure report until his registration is confirmed.

Locating a Pending Registrant for a Different Supervisor

In many locations, one POC handles all registration functions. However, in larger locations where there are many filers, there may be many Supervisor Assistants. On the occasion when a supervisor Assistant is on vacation or temporarily away for another reason, it is possible in FDM for a supervisor assistant to handle registration functions for another supervisor assistant.

The supervisor assistant, however, must Ensure that they have the correct names of the supervisor and senior legal counsel for the filers they have been asked to handle.

1. Click **Show All** on the Pending Self-Registration Requests page. A listing of all pending FDM filers is displayed.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Pending Self Registration Requests

Instructions: This page displays Pending Self Registration Requests to be confirmed or denied by the responsible individual. Make a selection in the "My Role" selection menu and press the "Go" button to filter the list to only those Requests that are related to you in the role you selected. Press "Show All" to display every Request for all users within your agency.

My Role: -SELECT- Go or Show All

Filtered By: Show All

Role	Name ▲	Supervisor	Senior Legal Counsel	ADAEO	Supervisor Text & e-Mail	SLC Text & e-Mail	
SF 278 Filer	Adams_1, A X	Super_278_1, Training X	Slc_278_1, Training X	Adaeo_1, Training X			Confirm Deny Edit
SF 278 Filer	Adams_10, A X	Super_278_1, Training X	Slc_278_1, Training X	Adaeo_1, Training X			Confirm Deny Edit
SF 278 Filer	Adams_11, A X	Super_278_1, Training X	Slc_278_1, Training X	Adaeo_1, Training X			Confirm Deny Edit
SF 278 Filer	Adams_12, A X	Super_278_1, Training X	Slc_278_1, Training X	Adaeo_1, Training X			Confirm Deny Edit

2. Click the arrow at the top of the **Name** column to list the pending registrants alphabetically.
3. Locate the name you are searching for on the list and follow the steps shown above to perform any of the registering functions.



The Reassign Supervisor Groups page is used to manage Filer to Reviewer group relationships for Supervisors and Senior Legal Counsel's.

There are times when it may be necessary to move a group of Filers from one Reviewer to another either on a permanent or temporary basis. There are two different assigned Filer groups – Direct and Acting Relationships. Filers within the Direct Relationship Group have an existing relationship with the selected Reviewer that was established by either the Filer or the Reviewer. Acting groups contain Filers who have a temporary relationship with the selected Reviewer.

Reassign Groups

Acting and Direct Relationships

Super_1 is a Supervisor with several filers who have a direct relationship. However, he will be on temporary leave for 3 months and G. Alfin will temporarily manage Super_1's filers. Super_1 will return after his temporary leave, and at that time, will again assume his role as supervisor.

Current Supervisor	New Supervisor	Filers
Super_1	G. Alfin_1	R. Roberts T. Kennedy A Franken

1. Click on **Admin/Supervisors**. The Search for Current Supervisor page is displayed.

Instructions: Use the criteria below to specify the filtering of the current supervisors in FDM.

Last Name: * Starts With Super_1
 First Name: Starts With Training
 Middle Name: Starts With
 e-mail: Starts With
 Agency: Army

*Required Items Per Page 20 Search

Add New Supervisor

2. Type **Super_1** in the Last Name Field and **Training** in the First Name field and then click **Search**. A list matching the search criteria is displayed at the bottom of the page.

Instructions: Use the criteria below to specify the filtering of the current supervisors in FDM.

Last Name: * Starts With Super_1
 First Name: Starts With Training
 Middle Name: Starts With
 e-mail: Starts With
 Agency: Army

*Required Items Per Page 20 Search

Add New Supervisor

1 to 11 of 11 Items per page: 20 1

Last Name	First Name	Middle Name	Grade	E-Mail Address	Phone	Organization	
Super_1	Training	X	GS13	training_super_1@us.army.mil	000-000-0000	Civilian	Reassign/Delete Edit
Super_10	Training	X	GS13	training_super_10@us.army.mil	000-000-0000	Civilian	Reassign/Delete Edit
Super_11	Training	X	GS13	training_super_11@us.army.mil	000-000-0000	Civilian	Reassign/Delete Edit

3. Locate Super_1 Training on the list and then click on **Reassign/Delete**. The Reassign/Delete Change Summary page is displayed.

- Although the page indicates that the action cannot be undone, you can actually go in and reassign your filers back to yourself.

The screenshot shows the 'Financial Disclosure Management' interface with the 'Supervisors' tab selected. A confirmation message reads: 'Reassign Supervisor Cannot be Undone'. Below this, a text box states: 'The reassign operation cannot be undone once completed. Do you wish to continue?'. At the bottom, there are two buttons: 'Cancel' and 'Continue'.

4. Select **Continue**. The Specify Replacement for Supervisor page displays.

The screenshot shows the 'Specify Replacement for Supervisor' page. It includes an instruction: 'Search and Select the Supervisor that Groups will be reassigned to'. Below this are input fields for 'Last Name', 'First Name', 'Middle Name', 'e-mail', and 'Agency'. The 'Last Name' field is set to 'Alfin_30' and the 'First Name' field is set to 'G'. There is a 'Cancel' button to the right of the name fields. At the bottom, there is a '*Required' label, an 'Items Per Page' dropdown set to '20', and a 'Search' button.

5. Enter G. Alfin's name in the appropriate fields, then click **Search**. A list of names matching the search criteria is displayed.

- ☞ If Super_1 were to leave permanently, his filers would be transferred to the Direct Relationship column and would be absorbed into your direct relationships. By moving Super_1's filers to an acting group keeps the filers separate from your direct relationships.

FDM_ TRAIN Test System
Financial Disclosure Management

My Reports My Info Review Filers Admin Resources
 Supervisors Pending User

Specify Replacement for Supervisor

Instructions: Search and Select the Supervisor that Groups will be reassigned to

Last Name: * Starts With Alfin_30
 First Name: Starts With G
 Middle Name: Starts With
 e-mail: Starts With
 Agency: Army
 *Required Items Per Page 20 Search

Cancel

1 to 1 of 1 Items per page: 20 1

Last Name	First Name	Middle Name	Grade	E-Mail Address	Phone	Organization	
Alfin_30	G	X	GS13	g_alfin_30@us.army.mil	000-000-0000	Civilian	Select

7. Locate G. Alfin's name on the list, then click on **Select**. The Reassign Supervisor Groups Page is displayed.

FDM_ TRAIN Test System
Financial Disclosure Management

My Reports My Info Review Filers Admin Resources
 Supervisors Pending User

Reassign Supervisor Groups

Use the buttons, move the "Reassigned From" groups to the "Reassigned To" groups lists as required [More Info](#)


Supervisor Groups to be reassigned from Super_1, Training X.

Groups to be reassigned to Alfin_30, G X.

Direct Relationships:

Acting Groups:

Cancel Continue

8. Since Super_1's leave is only temporary, his direct relationships will be transferred to G. Alfin as an Acting Group. Click on **Direct Relationships** under Super_1's column to highlight and then click on the  arrow beside the Acting Groups box to move the filers to G. Alfin.

9. Click **Continue**. The Reassign/Delete Supervisor Change Summary page is displayed confirming that Super_1's filers have been assigned to G. Alfin. The page also asks if you wish to remove Super_1 as a supervisor.

☞ No was selected since G. Alfin is on a temporary leave and will be back. YES would be selected if the person would not be returning to that role.

10. Click **No**, then click **Finish**. A message displays confirming that you wish to continue with the Reassign/Delete action.
11. Click **OK**. You return to the Search for Current Supervisors page.

Verifying the Filer's Reassignment

1. To verify that Super_1's filer's were moved to G. Alfin, click **Admin | User**. The Search for Current Users page is displayed.
2. Type **Kennedy_1** in the last name field and click **Search**. A listing of matching users is displayed at the bottom of the page.
3. Locate the appropriate name and click **View**. The User Profile for Kennedy displays.

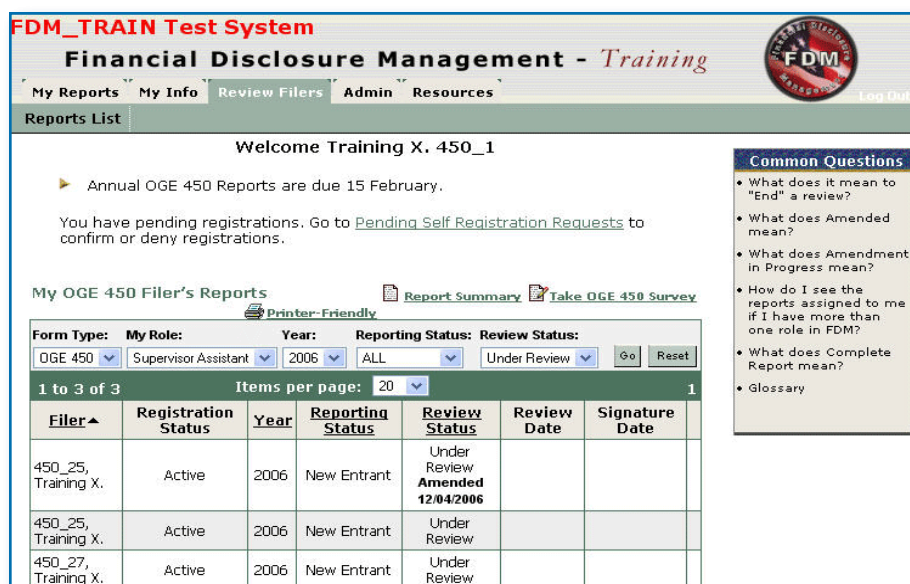
Notice that his supervisor is now G. Alfin.

In FDM, Reviewers, Senior Legal Counsel Assistants and Supervisor Assistants may view the Reporting and Review status of any report that has been submitted. In addition, you can also view a summary report of the types of reports that have been submitted.

Viewing Filer Status

- ☞ A supervisor assistant cannot view or sign the actual OGE 450 report and only has the ability to view the status from the Reports List page to monitor the reports and advise the supervisor they assist. The statuses are:
- ♦ **Draft** -- The financial disclosure report is currently in process. A filer has started the report but has not signed it. A Reviewer can view a draft report but cannot eSign.
- ♦ **Under Review** - The Filer has e-Signed and submitted the financial disclosure report for review. A Reviewer can act on the report review process by ending the review and notifying the next currently assigned reviewer or eSigning the financial disclosure report.
- ♦ **Under Review (Amended)** - The Filer has signed and submitted the financial disclosure report for review but is now making adjustments or corrections. The Filer must resign and resubmit the financial disclosure report after amending the report.

1. Click **Review Filers | Reports List**. The Reports List page is displayed.



FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports | My Info | Review Filers | Admin | Resources | Log Out

Reports List

Welcome Training X. 450_1

▶ Annual OGE 450 Reports are due 15 February.

You have pending registrations. Go to [Pending Self Registration Requests](#) to confirm or deny registrations.

My OGE 450 Filer's Reports [Printer-Friendly](#) [Report Summary](#) [Take OGE 450 Survey](#)

Filer	Registration Status	Year	Reporting Status	Review Status	Review Date	Signature Date
450_25, Training X.	Active	2006	New Entrant	Under Review Amended 12/04/2006		
450_25, Training X.	Active	2006	New Entrant	Under Review		
450_27, Training X.	Active	2006	New Entrant	Under Review		

Common Questions

- What does it mean to "End" a review?
- What does Amended mean?
- What does Amendment in Progress mean?
- How do I see the reports assigned to me if I have more than one role in FDM?
- What does Complete Report mean?
- Glossary

2. Make the following sorting selections at the top of the Report List and click **Go**.
 - ♦ Select **OGE 450** under **Form Type**.
 - ♦ Select **Supervisor Assistant** under **My Role**.
 - ♦ Select **2006** under **Year**.
 - ♦ Select **All** under **Review Status**.

Note the Filer's status in the Registration Status column.

- ♦ **Complete** - The certifying authority has approved the report after all reviews of the financial disclosure report are complete. Only Filers and reviewers may view the financial disclosure report, but not change it any further.

Printing the Reports List Page

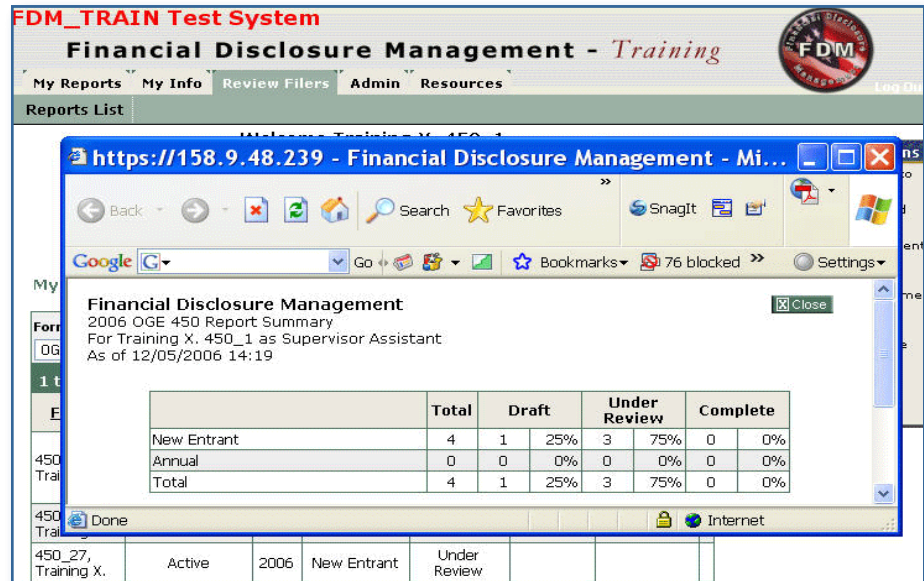
1. On the **Reports List** page, click **Printer Friendly**. A printer friendly report list is displayed.



2. You can click the **Printer icon** on your browser's tool bar or right-click the report window and click **Print** on the menu that is displayed.
3. Click **Close** to exit the report.

Viewing a Report Summary

1. On the Reports List page, click **Report Summary**. A report displays listing a summary of reports broken down by type of report and status.



2. You can click the **Printer icon** on your browser's tool bar or right-click the report window and click **Print** on the menu that is displayed.
3. Click **Close** to exit the report.



A Supervisor's Assistant can add, edit or delete Supervisors in the FDM. When adding a Supervisor to FDM, you must select a Senior Legal Counsel for the Supervisor.

Adding a New Supervisor to FDM


You have been notified to add a new Supervisor to FDM. You will also need to select a Senior Legal Counsel for the new supervisor.

New Supervisor	Supervisors' Senior Legal Counsel
D. Wagner_1	E. Pickney

Search for a Supervisor within FDM

1. Click **Admin | Supervisors**. The Search for Current Supervisors page is displayed.

- ☞ Select either "Starts With" or Contains when searching. For faster results, type the full last name and partial first name of the filer.
- ☞ If searching by e-mail, enter the filer's AKO email address only.
- ☞ The Search and Select New Supervisor search, searches within the AKO Directory. You do not need to be registered in FDM before they can be selected as a Supervisor in FDM.

FDM_TRAIN Test System


Financial Disclosure Management - Training

[My Reports](#)
[My Info](#)
[Review Filers](#)
[Admin](#)
[Resources](#)

[Supervisors](#)
[Pending](#)
[User](#)

Search for Current Supervisors

Instructions: Use the criteria below to specify the filtering of the current supervisors in FDM.

Last Name:*
Starts With
wagner_1

First Name:
Starts With
D

Middle Name:
Starts With

e-mail:
Starts With

Agency:
Army

*Required

Items Per Page
20
Search

Add New Supervisor

First, check to see if D. Wagner is already a Supervisor in the system.

FDM_TRAIN Test System

Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Search for Current Supervisors

Instructions: Use the criteria below to specify the filtering of the current supervisors in FDM.

Last Name: * Starts With wagner_1

First Name: Starts With D

Middle Name: Starts With

e-mail: Starts With

Agency: Army

*Required Items Per Page 20 Search

Add New Supervisor

Warning: No Items were located in your search

2. Type **Wagner** in the Last Name field and **D** in the First name field and click **Search**. A listing of matching FDM user names is displayed but D. Wagner's name is not on the list.

Adding a New Supervisor to FDM

3. Click **Add New Supervisor**. The Search and Select New Supervisor page is displayed.

FDM_TRAIN Test System

Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Search & Select New Supervisor

Instructions: Use the searching function below to identify a Supervisor. When you find the Supervisor, press the Select button in the corresponding system row.

Last Name: * Starts With wagner_1

First Name: Starts With D

Middle Name: Starts With

e-mail: Starts With

Agency: Army

*Required Items Per Page 20 Search

Cancel

4. Once again, type D. Wagner's name in the appropriate fields, then click **Search**. The results of your search are displayed at the bottom of the page.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Search & Select New Supervisor

Instructions: Use the searching function below to identify a Supervisor. When you find the Supervisor, press the Select button in the corresponding system row.

Last Name: * Starts With wagner_1
 First Name: Starts With D
 Middle Name: Starts With
 e-mail: Starts With
 Agency: Army

*Required Items Per Page 20 Search

Cancel

1 to 11 of 11 Items per page: 20 1

Last Name	First Name	Middle Name	Grade	E-Mail Address	Phone	Organization	
Wagner_1	D	X	GS13	d_wagner_1@us.army.mil	000-000-0000	Civilian	Select
Wagner_10	D	X	GS13	d_wagner_10@us.army.mil	000-000-0000	Civilian	Select
Wagner_11	D	X	GS13	d_wagner_11@us.army.mil	000-000-0000	Civilian	Select
Wagner_12	D	X	GS13	d_wagner_12@us.army.mil	000-000-0000	Civilian	Select

5. Locate D. Wagner's name on the list and click **Select** beside his name. The Add/Edit Supervisor page is displayed confirming that you wish to make him a supervisor.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Add/Edit Supervisor

Are you sure you want to make Wagner_1, D X, a Supervisor?

Confirm Cancel

6. Click **Confirm**. The system registers D. Wager as a supervisor, and then prompts you to select D. Wagner's Senior Legal Counsel.

D. Wagner receives an e-mail message indicating that you added him as a supervisor in FDM.

Selecting a Senior Legal Counsel for a Supervisor

You need to select a Senior Legal Counsel, E. Pickney, for D. Wagner.

- The Agency default Senior Legal Counsel is automatically selected. You can change the default Senior Legal Counsel at any time.

- To assign a Senior Legal Counsel, click **Select**. The Search and Select New Senior Legal Counsel page is displayed.

- Type E. Pickney's name in the appropriate fields, then click **Search**. A listing of matching Senior Legal Counsels is displayed at the bottom of the page.

FDM_TRAIN Test System

Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Search & Select New Senior Legal Counsel

Instructions: Use the searching function below to identify a Senior Legal Counsel (SLC). When you find the SLC, press the Select button in the corresponding system row.

Last Name: * Starts With Pickney
 First Name: Starts With E
 Middle Name: Starts With
 e-mail: Starts With
 Agency: Army
 *Required Items Per Page 20 Search

Cancel

1 to 1 of 1 Items per page: 20 1

Search Results

Last Name	First Name	Middle Name	Grade	E-Mail Address	Phone	Organization	
Pickney	E	X	GS13	e_pickney@us.army.mil	000-000-0000	Civilian	Select

9. Locate E. Pickney's name and click **Select** beside his name. You return to the Add/Edit Supervisor page showing E. Pickney is selected as the Supervisor's Senior Legal Counsel.

Complete Adding a Supervisor in FDM

FDM_TRAIN Test System

Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Add/Edit Supervisor: Wagner_1, D X.

Supervisor's Senior Legal Counsel: Pickney, E X. Change

Add Cancel

10. Click **Add**. A confirmation page is displayed showing that the person selected has been added as a supervisor.



11. Click **Continue** to return to the Search for Current Supervisors page.



View User Profiles

Supervisor Assistants have the ability to look up the profile of a user in FDM in addition to the profiles of any associated users within the profile.

You wish to view the profile of a Supervisor Assistant as well as the profile of those associated with the Supervisor Assistant.

User

450_X

1. Click **Admin | User**. The Search for Current Users is displayed.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports | My Info | Review Filers | Admin | Resources

Supervisors | Pending | User

Search for Current Users

Instructions: Use the criteria below to specify the filtering of the current users in FDM.

Last Name: * Starts With [v] []
 First Name: Starts With [v] []
 Middle Name: Starts With [v] []
 e-mail: Starts With [v] []
 Agency: Army [v]
 *Required Items Per Page 20 [v] Search

2. Type **450_XX** in the Last Name field and click **Search**. The results of the search criteria are displayed at the bottom of the page.

- ☞ Select either “Starts With” or Contains when searching. For faster results, type the full last name and partial first name of the filer.
- ☞ If searching by e-mail, enter the filer’s DOD Common Access Card embedded e-mail address only.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Search for Current Users

Instructions: Use the criteria below to specify the filtering of the current users in FDM.

Last Name: * Starts With 450_30
 First Name: Starts With Training
 Middle Name: Starts With
 e-mail: Starts With
 Agency: Army

*Required Items Per Page 20 Search

1 to 1 of 1 Items per page: 20 1

Last Name	First Name	Middle Name	Grade	E-Mail Address	Phone	Organization	
450_30	Training	X	GS13	training_450_30@us.army.mil	000-000-0000		Edit View

3. Locate your name on the list and then click **View**. The User Profile is displayed. The page shows that you are looking at a 450 Filer.

FDM_TRAIN Test System
Financial Disclosure Management - Training

My Reports My Info Review Filers Admin Resources

Supervisors Pending User

Search for Current Users

Instructions: Use the criteria below to specify the filtering of the current users in FDM.

Last Name: * Starts With Burr_1
 First Name: Starts With
 Middle Name: Starts With
 e-mail: Starts With
 Agency: Army

*Required Items Per Page 20 Search

1 to 11 of 11 Items per page: 20 1

Last Name	First Name	Middle Name	Grade	E-Mail Address	Phone	Organization	

4. Select **Supervisor Assistant** from the Role drop-down menu. A listing of the Supervisor’s you are assisting is displayed.

User Profile - 450_30, Training X.

Roles: Supervisor Asst. ▼

Supervisors

Nicholson, B X.
Super 450_1, Training X.

5. Click **Nicholson, B.** The page now displays B. Nicholson's User Profile.

User Profile - Nicholson, B X.

Roles: Supervisor ▼

Senior Legal Counsel: Slc_1, Training X.

Supervisor Assistants

450_1, Training X.
450_10, Training X.
450_11, Training X.
450_12, Training X.
450_13, Training X.
450_14, Training X.
450_15, Training X.
450_16, Training X.
450_17, Training X.
450_18, Training X.
450_19, Training X.
450_2, Training X.
450_20, Training X.
450_21, Training X.
450_22, Training X.
450_23, Training X.
450_24, Training X.
450_25, Training X.

6. When complete, click on the **X** at the top right of the screen to close.

Changing a Filer's Agency and Filer Category

Supervisor Assistants have the ability to look up the profile of a user in FDM and edit their agency and filer category.

User	Agency	Filer Category
450_X	Current: United States Army New: United States Navy	Change: No Selection To: Military

FDM_TRAIN Test System
Financial Disclosure Management - *Training*

My Reports | My Info | Review Filers | Admin | Resources | Log Out

Supervisors | Pending | **User**

Search for Current Users

Instructions: Use the criteria below to specify the filtering of the current users in FDM.

Last Name: * Starts With 450_30
First Name: Starts With Training
Middle Name: Starts With
e-mail: Starts With
Agency: Army
*Required Items Per Page 20 Search

1 to 1 of 1 Items per page: 20 1

Last Name	First Name	Middle Name	Grade	E-Mail Address	Phone	Organization	
450_30	Training	X	GS13	training_450_30@us.army.mil	000-000-0000		Edit View

1. Click **Edit** beside 450_X's name. The Directory Lookup Details is displayed.

Close

Directory lookup Details for 450_1, Training X.

Attribute	Value
Last Name	450_1
First Name	Training
Middle Name	X
e-Mail	training_450_1@us.army.mil
Organization	
Phone	000-000-0000
Agency	Amy
Filer Category	No Selection

Save

2. Select **United States Navy** from the Agency drop-down list.

Close


Directory lookup Details for 450_1, Training X.

Attribute	Value
Last Name	450_1
First Name	Training
Middle Name	X
e-Mail	training_450_1@us.army.mil
Organization	
Phone	000-000-0000
Agency	Navy
Filer Category	No Selection



Save


No Selection
 PAS
 Non-Career SES
 Career SES
 Schedule C
 Military
 Other

3. Select **Military** from the Filer Category list.



Directory lookup Details for 450_1, Training X.

Attribute	Value
Last Name	450_1
First Name	Training
Middle Name	X
e-Mail	training_450_1@us.army.mil
Organization	
Phone	000-000-0000
Agency	Navy 
Filer Category	Military 

 Save

- Click **Save** to save your changes, then click on **Close** to exit the window. You return to the Search for Current Users page.